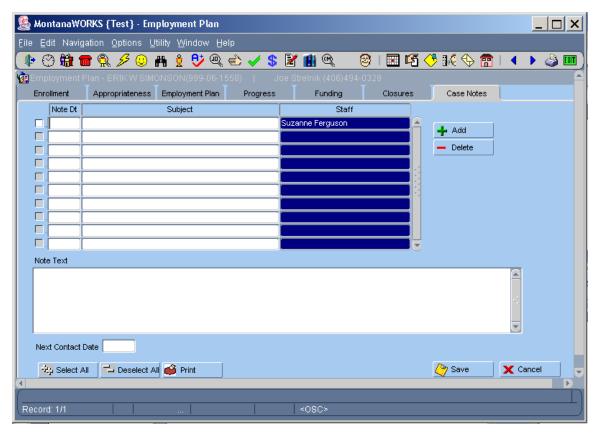
Employment Plan Screen

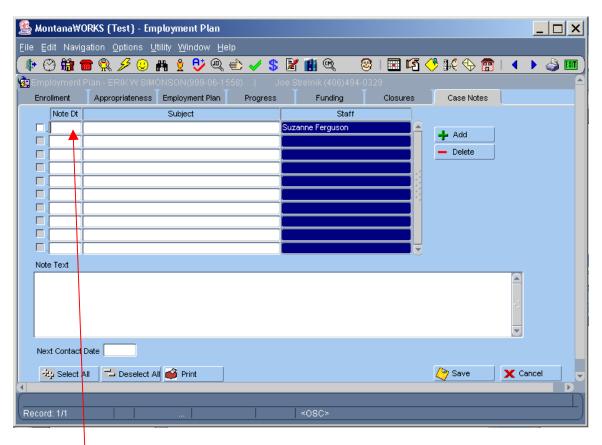
Case Note Tab



To add a case note, click on the "Case Note" tab on the **Employment Plan** screen.

Employment Plan Screen

Case Note Tab



Double click in the "Note Dt" field or type in the date of your note.

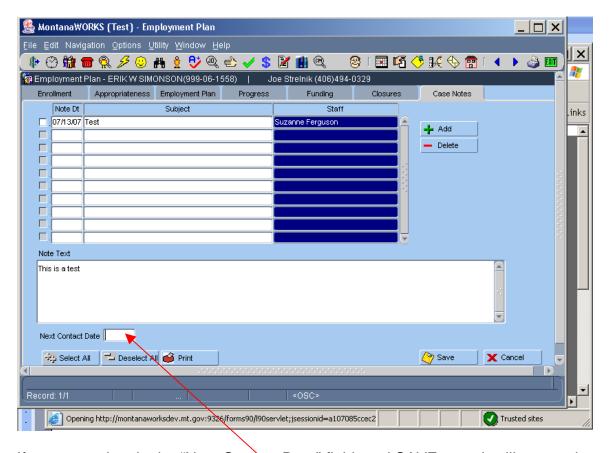
Type a subject.

The case note text is typed in the "Note Text" field at the bottom of the screen.

SAVE when you are done.

Employment Plan Screen

Case Note Tab

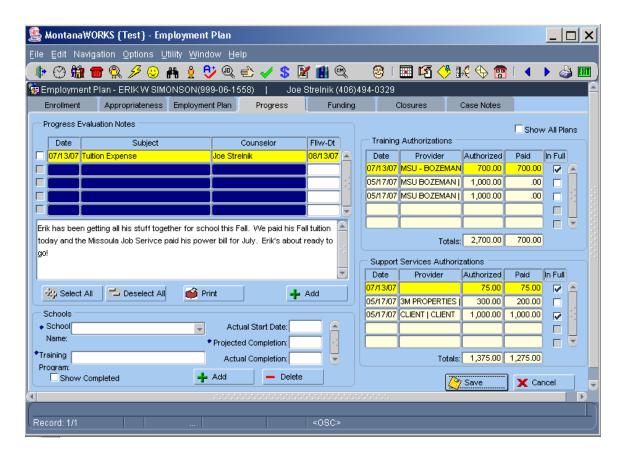


If you put a date in the "Next Contact Date" field, and SAVE, a task will appear in your scheduler for that date.

You might want to use this as a reminder for a monthly contact.

The Notes on this screen are available for everyone who has access to the case management portion of MontanaWORKS to see. People who have access to only the Employment Service portion of MontanaWORKS will not be able to view these notes.

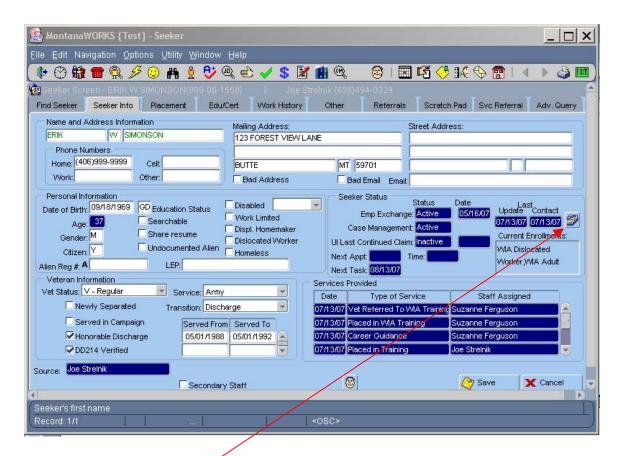
Difference between notes on Note Screen Tab on the Employment Plan Screen and the notes on the Progress Tab.



Progress Tab:

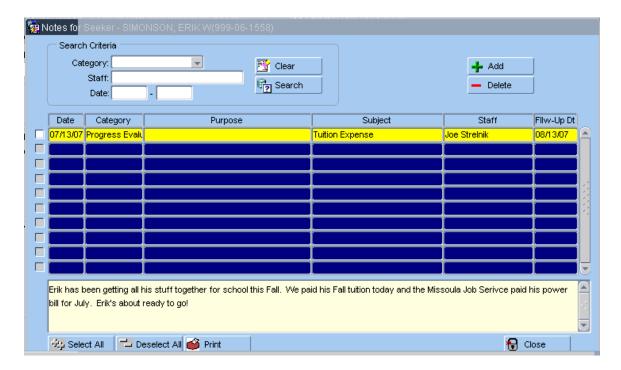
The notes put here are visible to all users on the system. They will appear on the Seeker screen . These notes would pertain to the progress of the participant through their training program.

You can see these notes on the Seeker screen, Seeker info tab.



The notes from the "Progress Tab" show up on the right side of the screen with the icon that looks like file folders stacked up in a row.

Click on the icon to see the notes.



This screen will pop up and it shows you the progress notes.

Employment Plan Screen

Case Notes Tab

The notes on this screen are not visible to users other than the case management staff. You would use this screen to put notes that don't necessarily pertain to the person's training program.

You do <u>not</u> need to duplicate notes on either one of these screens. The main thing to remember is that if you put a note on the progress screen, it will be visible to all MontanaWORKS users.